



Filing ID #10021524

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Michael Goldstein  
**Status:** Congressional Candidate  
**State/District:** CA12

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2018  
**Filing Date:** 05/6/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Carter Validus Mission Critical REIT [RE]		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Greenbacker Renewable Endergy Company [HE]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
IRAs ⇒ American Tower Corporation [RE]		\$1,001 - \$15,000	Tax-Deferred		
IRAs ⇒ AT&T Inc. (T) [ST]		\$1,001 - \$15,000	Tax-Deferred		
IRAs ⇒ Calvert Global Water Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRAs ⇒ Consolidated Water Co. Ltd. - Ordinary Shares (CWCO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
IRAs ⇒ Container Store (TCS) [ST]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
IRAs ⇒ Core Sweep Fund -- traditional IRA [IH]		\$1,001 - \$15,000	Tax-Deferred		
IRAs ⇒ Gilead Sciences, Inc. (GILD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
IRAs ⇒ Kimberly-Clark Corporation (KMB) [ST]		\$1,001 - \$15,000	Tax-Deferred		
IRAs ⇒ Parnassus Core Equity Instl [MF]		\$15,001 - \$50,000	Tax-Deferred		
IRAs ⇒ PARNASSUS MID CAP FD INSTITUTIONAL [MF]		\$15,001 - \$50,000	Tax-Deferred		
IRAs ⇒ Pax World Small Cap Fund Institutional [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRAs ⇒ Public Storage Dep Shs Representing 1/1000th Pfd Sh Ben Int Ser Z (PSAPP) [ST]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: The asset name is wrong but the closest which the system will accept. The security is actually PSAPrV: Public Storage Preferred Stock Depositary Shares Representing 1/1000 of a 5.375% Cumulative Preferred Share of Beneficial Interest, Series V \$0.01 par value COMMENTS: (Asset name lookup returned no results, so the system will not allow entering the name)					
IRAs ⇒ Qorvo, Inc. (QRVO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
IRAs ⇒ Realty Income Corporation (O) [ST]		\$1,001 - \$15,000	Tax-Deferred		
IRAs ⇒ Roth IRA [IH]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Cash account					
IRAs ⇒ Ultra Clean Holdings, Inc. (UCTT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
IRAs ⇒ Unilever PLC (UL) [ST]		\$1,001 - \$15,000	Tax-Deferred		
IRAs ⇒ United Parcel Service, Inc. (UPS) [ST]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
IRAs ⇒ Vanguard Health Fund Admiral Shares [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRAs ⇒ Vicor Corporation (VICR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Sweep acct. held in NY Community Bank [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Trilinc Global Impact Fund LLC [HE]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Trust ⇒ Abbott Laboratories (ABT) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ AFLAC Incorporated (AFL) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ Apple Inc. (AAPL) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ Cisco Systems, Inc. (CSCO) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ Costco Wholesale Corporation (COST) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ Emerson Electric Company (EMR) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ Flowserve Corporation (FLS) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ Fort Wayne Community Schools Bond [GS]		\$1,001 - \$15,000	None		
Trust ⇒ Franklin Electric Co., Inc. (FELE) [ST]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Trust ⇒ General Electric Company (GE) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ Gilead Sciences, Inc. (GILD) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ Home Depot, Inc. (HD) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ INDIANA MUN PWR AGY PWR SUPPLY SYS REV REF REV BDS 2014A 5.000% 01/01/28 B/E DTD 12/11/14 CLB CLB o [GS]		\$1,001 - \$15,000	None		
Trust ⇒ INDIANA ST FIN AUTH REV REV AND REF BDS EARLHAM COLLEGE 2013A 4.000% 10/01/21 B/E DTD 01/30/13 N/C [GS]		\$1,001 - \$15,000	None		
Trust ⇒ INDIANAPOLIS IND GAS UTIL REV RFDG-2ND LIEN- DISTR-SER B 5.250% 08/15/25 B/E DTD 04/10/08 PRF CLB o8 [GS]		\$1,001 - \$15,000	None		
Trust ⇒ Intel Corporation (INTC) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ iShares S&P 100 ETF (OEF) [MF]		\$1 - \$1,000	None		
Trust ⇒ Jacobs Engineering Group Inc. (JEC) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ Johnson & Johnson (JNJ) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ Kroger Company (KR) [ST]		\$1 - \$1,000	None		
Trust ⇒ Lakeland Financial Corporation (LKFN) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Trust ⇒ NextEra Energy, Inc. (NEE) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ ONEOK, Inc. (OKE) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ Pfizer, Inc. (PFE) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ Praxair, Inc. (PX) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ Procter & Gamble Company (PG) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ Stryker Corporation (SYK) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ Sysco Corporation (SYU) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ Target Corporation (TGT) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ U.S. Bancorp (USB) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ United Technologies Corporation (UTX) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ Vodafone Group Plc - American Depositary Shares each representing ten Ordinary Shares (VOD) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ Walgreens Boots Alliance, Inc. (WBA) [ST]		\$1,001 - \$15,000	None		
Trust ⇒ WARSAW IND MULTI-SCH BLDG CORP RFDG & IMPT- FIRST MTG 5.000% 07/15/25 B/E DTD 12/21/16 N/C		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
[GS]					
Trust ⇒ WEST BADEN SPRINGS IND TOWN REDEV AUTH LEASE RENT REV LEASE RENTAL REV BDS 2009 6.000% 02/01/25 B/E [GS]					
		\$1,001 - \$15,000	None		

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
California Public Employees' Retirement System	Pension	\$8,089.00	\$19,230.00
Judicial Council of California	Fees for services rendered	\$.00	\$10,090.00
S. Diamond	Fees for services rendered	N/A	\$650.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

Source (Name and Address)	Brief Description of Duties
Judicial Council of California (San Francisco, CA, US)	Representing indigents in state criminal appeals, certiorari

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none"> <li>IRAs</li> <li>Trust (25% Interest)</li> </ul>
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## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

## CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

**Digitally Signed:** Michael Goldstein , 05/6/2018